



## Purpose

Bulk editing allows the user to update the value of a single attribute/field, on multiple rows, at one time. Planview introduced **Bulk Editing** to the following screens with the November 2022 release. Future releases will likely expand this feature to other screens.

- **Work View** screen:
  - **Changes** tab
  - **Risks** tab
  - **Issues** tab
  - **Action Items** tile
- **My Overview** menu option:
  - **My Action Items** tile
- **CRI Summary** screens

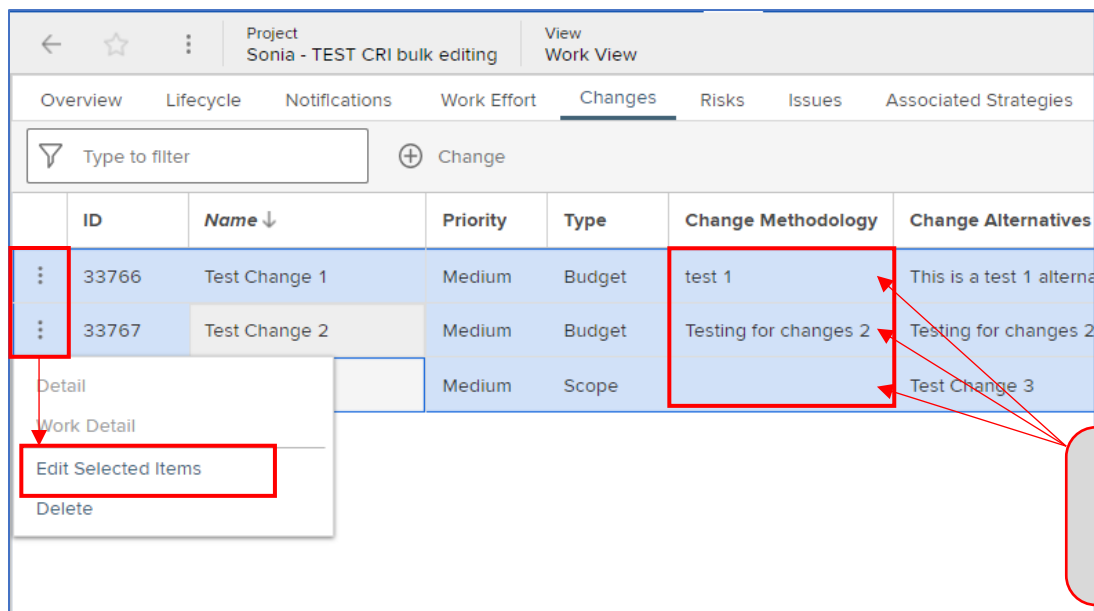
You can see Planview's notes on this topic under [Updating a Single Attribute's Value on Multiple Rows](#) in the customer success center.

## Responsibility

Bulk editing can be completed by any user having the grants to edit the items to be edited.

## Step-by-Step

1. Select one or multiple rows to update on any screen where bulk editing is available.
  - a. Press the **<Ctrl>** key and select individual lines (or click anywhere on the first line to be changed then press the **<Shift>** key and click on the last line to be changed).
2. Click on the kabob (:) to the left of one of the selected rows (or right click on one of the selected rows) and select **Edit Selected Items**.



Project: Sonia - TEST CRI bulk editing | View: Work View

Overview | Lifecycle | Notifications | Work Effort | **Changes** | Risks | Issues | Associated Strategies

Type to filter | + Change

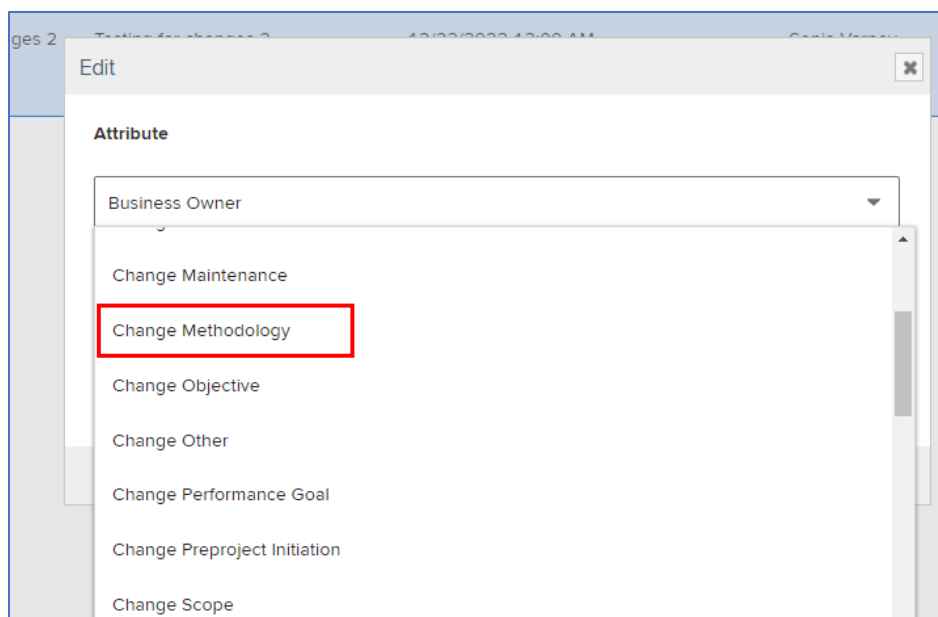
	ID	Name ↓	Priority	Type	Change Methodology	Change Alternatives
⋮	33766	Test Change 1	Medium	Budget	test 1	This is a test 1 alterna
⋮	33767	Test Change 2	Medium	Budget	Testing for changes 2	Testing for changes 2
			Medium	Scope		Test Change 3

Detail  
Work Detail  
**Edit Selected Items**  
Delete

**Note:** the current values in the Change Methodology column on each of the lines in the example.

- From the **Edit** list, find and select the **attribute**/field you want to change. (Not all attributes are available to be edited).

For this example, the field **Change Methodology** is selected to be updated.



ges 2 | Testing for changes 2 | 12/22/2023 12:00 AM | Sonia Veron

Edit

Attribute

Business Owner

Change Maintenance

**Change Methodology**

Change Objective

Change Other

Change Performance Goal

Change Preproject Initiation

Change Scope

- Click in the box under **Value** list and enter the value you want to use.

**TIP:** Depending on the type of attribute you selected, you may have a data picker, calendar or may need to type a value.

5. Click **Apply** to update the attribute in all the rows you selected.

Edit

Attribute

Change Methodology

Value

New Test Methodology

Apply Cancel

6. Notice that all values under **Change Methodology** column have been updated to **New Test Methodology**.

Project Sonia - TEST CRI bulk editing

View Work View

Overview

Lifecycle

Notifications

Work Effort

Changes

Risks

Issues

Associated Strategies

Associated

Type to filter

Change

	ID	Name ↓	Priority	Type	Change Methodology	Change Alternatives Description
⋮	33766	Test Change 1	Medium	Budget	New Test Methodology	This is a test 1 alternatives
⋮	33767	Test Change 2	Medium	Budget	New Test Methodology	Testing for changes 2
⋮	33768	Test Change 3	Medium	Scope	New Test Methodology	Test Chan

Note: new values the Change

**Note:** new values in the **Change Methodology** column.